ForwardHealth Provider Portal
Account User Guide

Date Last Updated: February 23, 2010

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1 General Information

1.1 Introduction

In a continuing effort to provide efficiency and ease of use of the Wisconsin BadgerCare Plus system, the state has introduced the Wisconsin ForwardHealth Portal. Through this portal, professionals throughout the health care industry can perform various functions to speed the process of obtaining information, processing claims, checking status of patient benefits and other administrative requirements to conform with the Health Insurance Portability and Accountability Act of 1996 (also known as HIPAA).

In order to take advantage of this state of the art process for healthcare administrative requirements, users must obtain and maintain user accounts on the portal. The following organization types may obtain login credentials and accounts through the processes detailed.

- **Providers** – Account registration information is sent to the applicant pending completion of the process located on the portal. Providers can start this process by visiting the portal, clicking on the Providers link, and clicking on the Request Portal Access link. Upon completing this process a Personal Identification Number (PIN) will be mailed to the provider in a welcome letter.

- **Managed Care Organizations (MCOs)** – Upon registration as an MCO, Welcome letters containing the User ID and Personal Identification Number (PIN) are automatically mailed to the organization.

- **Partners** – Upon completing the ForwardHealth access request process, Partners receive a User ID and password via e-mails.

- **Trading Partners** - Account registration information is sent to the applicant pending completion of the process located on the portal. Trading Partners can start this process by visiting the ForwardHealth portal and completing the Trading Partner Profile application. Upon completing this process a Personal Identification Number (PIN) will be mailed to the trading partner in a letter.

Important: No access to the portal will be possible without the User ID and Personal Identification Number (PIN)/Password obtained through one of the registration processes shown above.

1.2 Roles

Important: Upon receipt of the User ID and PIN, and before the organization can begin using portal applications, account administrators must set up their account as shown in section 2 of this User Guide.

Each user of the ForwardHealth Portal is assigned a role to carry out their duties. In this way, accountability and strict access control are maintained with regard to patient records. Access to the applications on the portal is controlled by the type of role an individual is assigned as shown below.

- **Account Administrators** – These individuals have overall responsibility for management of the account. Therefore, they have complete access to all applications within the secure section for the user type (Provider, MCO, Trading partner) of the portal and are permitted to add, remove, and manage other individual roles and their access. This does not apply to partner site users. This does not apply to Partner site users.

- **Clerk Administrators** – These individuals assist with reducing administrative overhead for account administrators by adding, deleting, and managing clerks. They are permitted to assign roles to clerks under their purview. This does not apply to Partner site users.

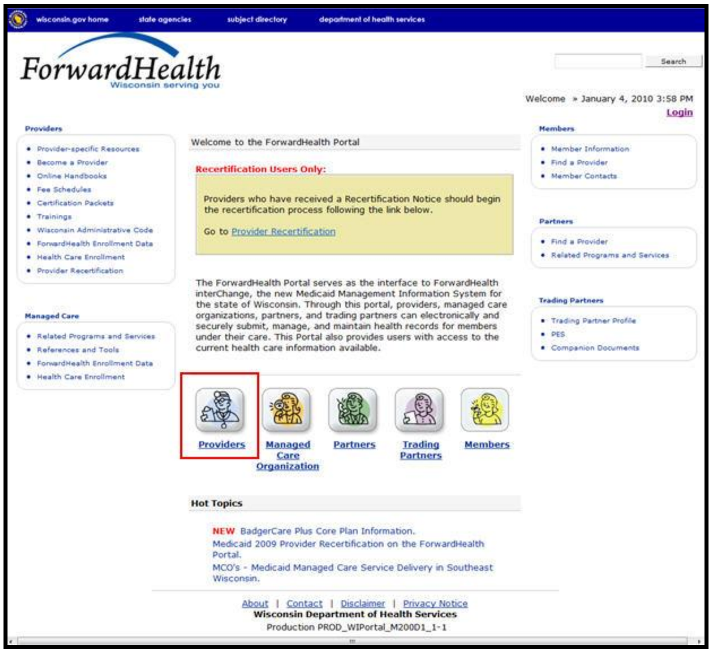
- **Clerks** - These personnel perform functions for their managed care organization, trading partner, or provider by performing specific tasks through the ForwardHealth portal. These roles are limited in that they can only perform tasks for which they have received authorization and access from an Account Administrator or Clerk Administrator.

2 Request Access

To open a ForwardHealth Provider Portal account, providers must begin the process by requesting a **Personal Identification Number (PIN)** number. Providers can request as many PIN numbers as needed for each service location.

1. To request a PIN number, access the ForwardHealth Portal at *www.forwardhealth.wi.gov/.*

   The ForwardHealth Portal home page will be displayed.



ForwardHealth Portal Home Page

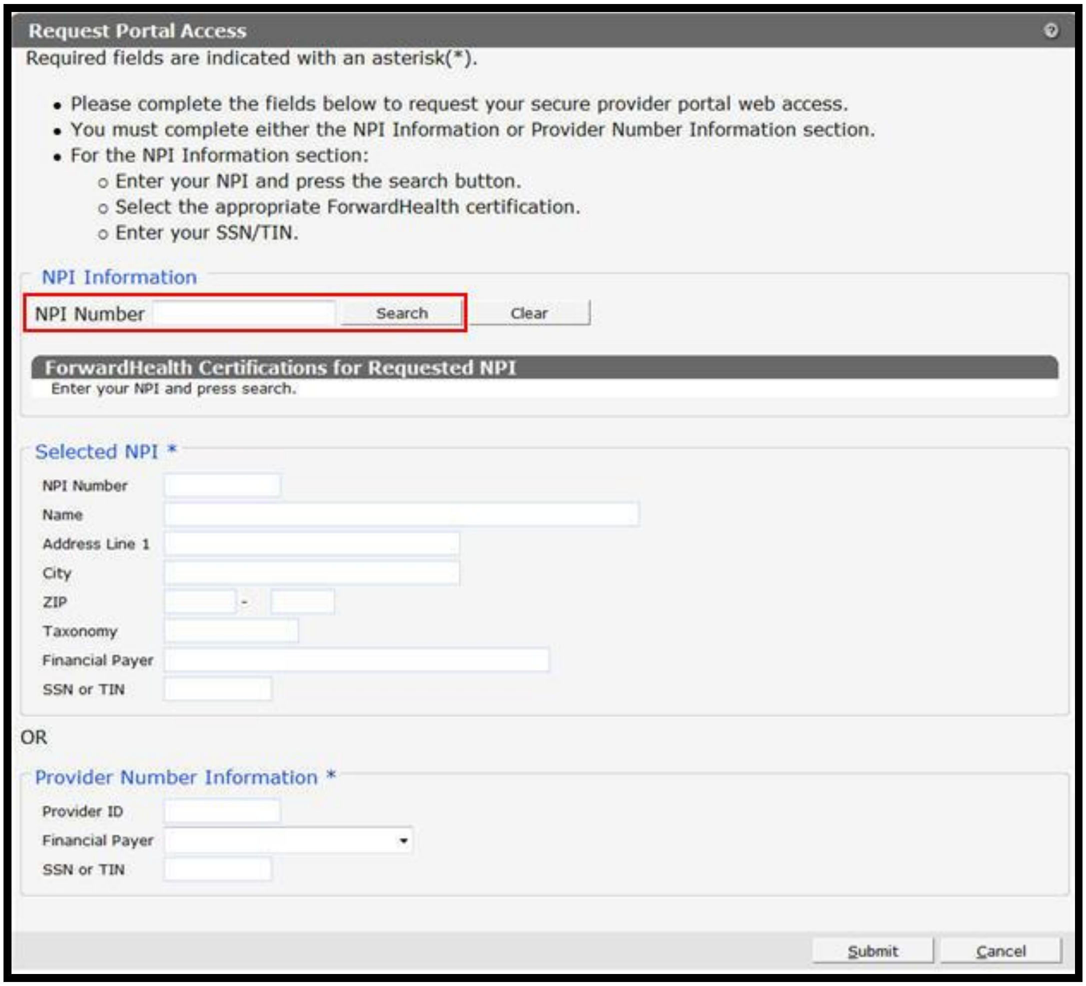
2. Click Providers.

   The provider public home page will be displayed.

Provider Public Homepage

3. In the **Quick Links** panel on the right of the page, click **Request Portal Access**.

   The Request Portal Access panel will be displayed.



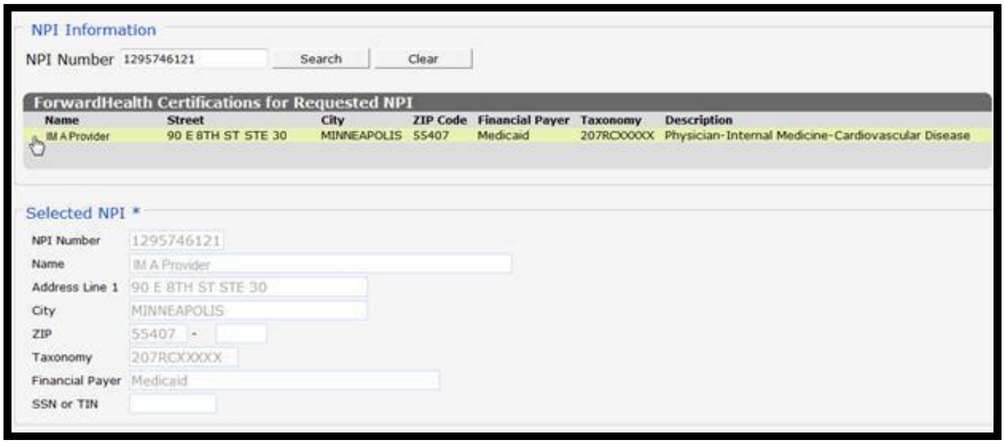
Request Portal Access Panel

4. Enter the provider's National Provider ID (NPI) number in the **NPI Number field** in the top panel. If the provider does not have an NPI number, go to Step a below.

5. Click **Search**.

   The page will refresh;

   - If the information is located, the **ForwardHealth Certifications for Requested NPI** panel will populate with the provider's selected NPI information.



Go to Step 6.

- If the information cannot be located, a message similar to the following will display at the top of the page if the user has not entered the correct social security number (SSN) or tax identification number (TIN) :

a. Scroll down to the Provider Number Information section.

b. Enter the provider’s provider ID in the **Provider ID** field.

c. Select the financial payer certification for which the provider is requesting access from the **Financial Payer** drop-down menu.

d. Enter the Social Security Number or Tax Identification Number in the **SSN or TIN** field.

6. Click **Submit**.

- If the request is successful, the following page will display and a letter containing the provider **PIN** will be sent to the address on file with ForwardHealth.

Access Request Conformation Screen

Go to Chapter 3 Login for First Time and Set up Administrator Account.

- If the request is not successful, the following message will display at the top of the page:

The following messages were generated:
The PIN request has been rejected. A ForwardHealth certification could not be identified based on the information provided.

The most common reasons for denied requests are:

- ○ **No provider agreement on file** - call Provider Services at 1-800-947-9627 for the agreement
- ○ **SSN or TIN number is incorrect** - check the number and enter the correct number
- ○ **PIN already requested** - check within your organization to find out if someone has already received the PIN and set up accounts.

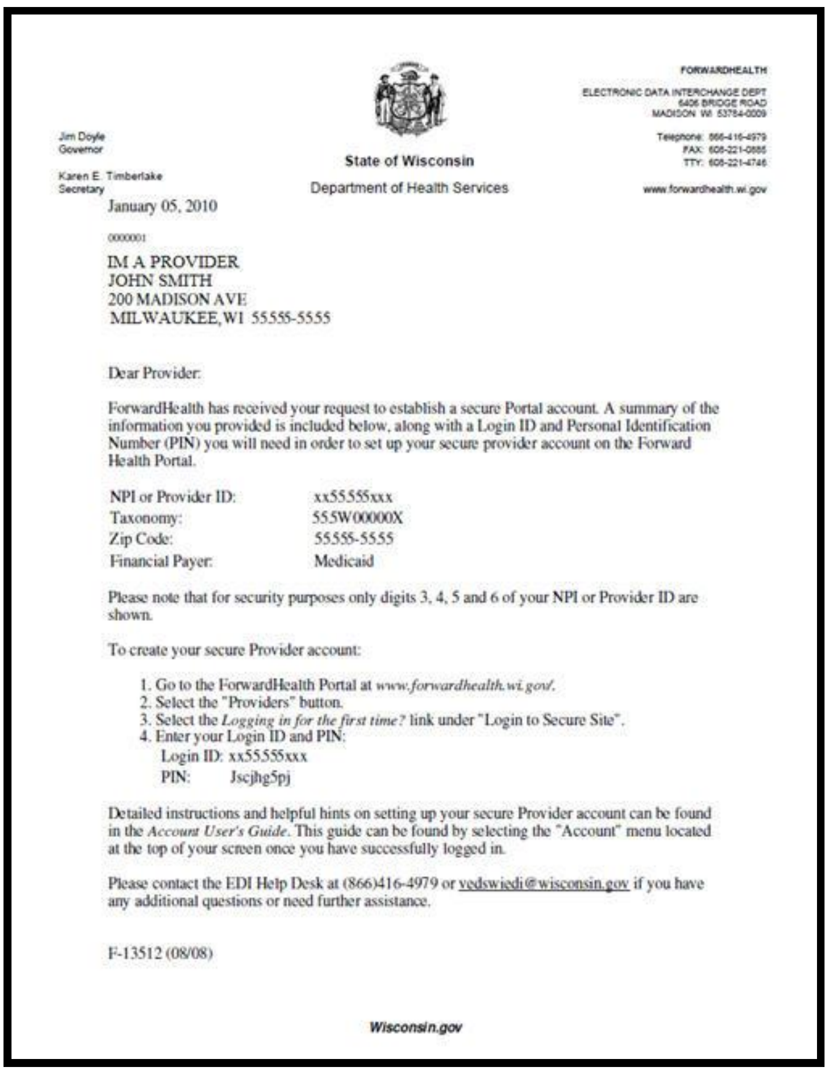
For any problems, call the Portal help desk (Toll-free) at 1-866-908-1363 between the hours of 8:30 AM 4:30 PM, Monday through Friday.

3 Login for First Time and Set up Administrator Account

Users MUST complete this action before access is granted to other functionality on the portal. After receipt of the User ID and Personal Identification Number (PIN), organizations must use the Account Setup to establish their administrative account on the ForwardHealth portal. It is at this time that users create a username and password for future access to the portal as well as enter contact and security information. This does not apply to Partner site users.

Important: In order to utilize the Setup application, you MUST have received a User ID and Personal Identification Number (PIN) access code from ForwardHealth. How the User ID and PIN is received differs on your Organization Type as detailed in the Account Overview documentation.

Approximately one week after submitting an online request for Portal Access, you will receive a letter with your PIN number and instructions for logging into the Portal account that has been set up for you.



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www.forwardhealth.wi.gov

January 05, 2010

0000001

IM A PROVIDER
JOHN SMITH
200 MADISON AVE
MILWAUKEE, WI 55555-5555

Dear Provider:

ForwardHealth has received your request to establish a secure Portal account. A summary of the information you provided is included below, along with a Login ID and Personal Identification Number (PIN) you will need in order to set up your secure provider account on the Forward Health Portal.

NPI or Provider ID:	xx55555xxx
Taxonomy:	555W00000X
Zip Code:	55555-5555
Financial Payer:	Medicaid

Please note that for security purposes only digits 3, 4, 5 and 6 of your NPI or Provider ID are shown.

To create your secure Provider account:

1. Go to the ForwardHealth Portal at *www.forwardhealth.wi.gov/*.
2. Select the "Providers" button.
3. Select the *Logging in for the first time?* link under "Login to Secure Site".
4. Enter your Login ID and PIN:
   Login ID: xx55555xxx
   PIN: Jscjhg5pj

Detailed instructions and helpful hints on setting up your secure Provider account can be found in the *Account User's Guide*. This guide can be found by selecting the "Account" menu located at the top of your screen once you have successfully logged in.

Please contact the EDI Help Desk at (866)416-4979 or vedswiedi@wisconsin.gov if you have any additional questions or need further assistance.

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Wisconsin.gov

PIN Letter

1. Once you receive the PIN letter, access the ForwardHealth Portal at ***www.forwardhealth.wi.gov***.

   The ForwardHealth Portal Home Page will be displayed.

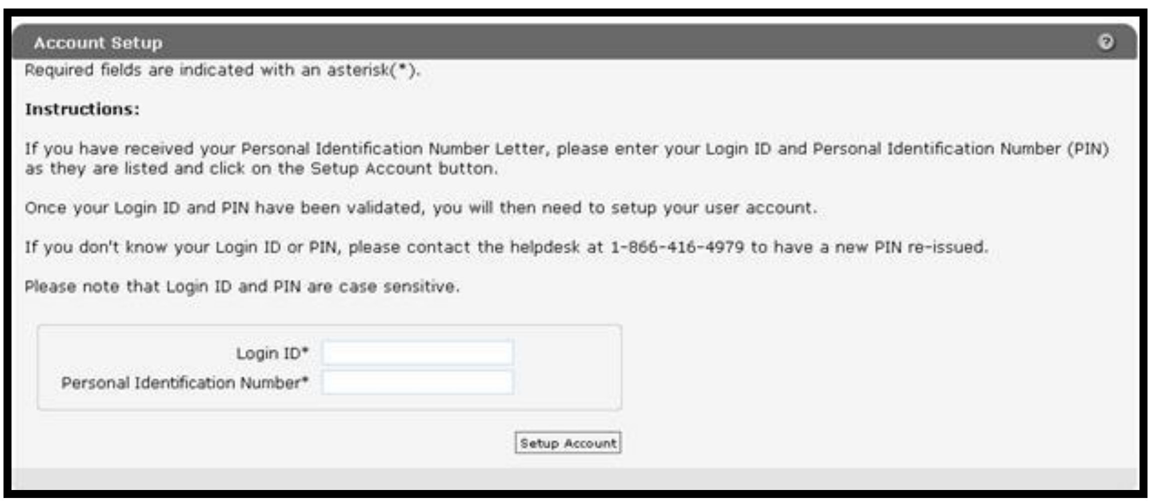
2. Click the **Provider** button.

   The public Provider Home Page will be displayed.

Public Provider Home Page

3. In the **Login to Secure Site** section on the right of the page, click **Logging in for the first time**.

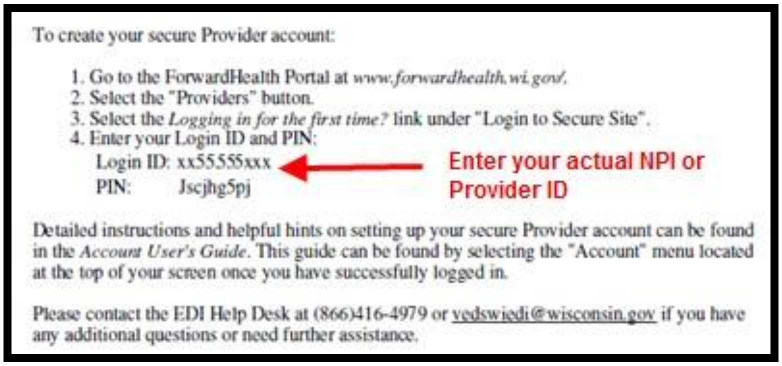
   The **Account Setup** panel will be displayed.



Account Setup Login Panel

4. Enter the **Login ID** and **PIN** that was mailed.

For security purposes, the PIN letter will contain only 4 digits of the NPI or Provider Number reported, however, providers should **enter the entire number** and the PIN number that appears on the letter.



To create your secure Provider account:

1. Go to the ForwardHealth Portal at *www.forwardhealth.wi.gov/*.
2. Select the "Providers" button.
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4. Enter your Login ID and PIN:

Login ID: xx55555xxx

PIN: Jscjhg5pj

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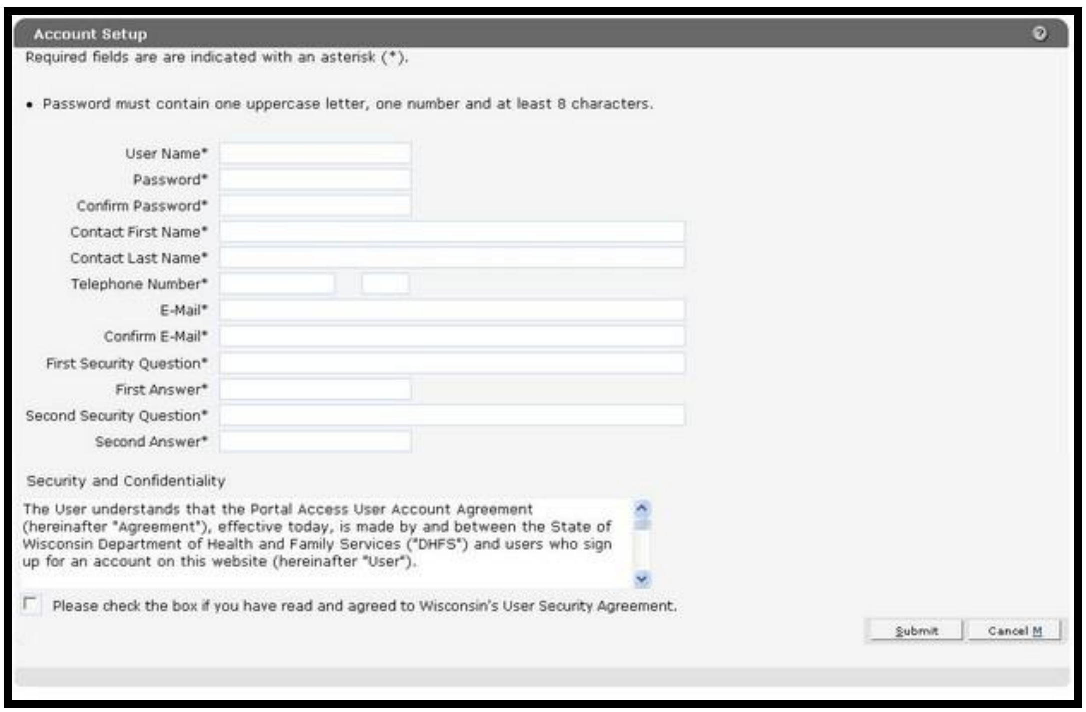
Please contact the EDI Help Desk at (866)416-4979 or vedswiedi@wisconsin.gov if you have any additional questions or need further assistance.

Enter NPI or Provider Number

This is a one-time use PIN. Once you have established an account, you cannot use this PIN again.

5. After entering your login ID and PIN, click **Setup Account**.

   The **Account Setup** panel will be displayed.



Account Setup Information Panel

6. Fill in the necessary information in the fields provided. Note that it is necessary to **complete all the fields** in this panel.
   - The password you create MUST have at least one uppercase letter and one number or you will be asked to re-enter a password.

- You will need to create two security questions and corresponding answers in the steps which follow. In the event you forget or lose your password in the future, this information will be used to validate your identity and allow you to reset your password.
- Security questions cannot contain characters other than A-Z, a-z, or 0-9

7. Read the Security and Confidentiality agreement and click the agreement checkbox.
8. Click **Submit**.

   You will receive a confirmation message indicating that your information was saved.

3.1 Reset Password

The **Reset Password** function can be used to reset a forgotten password.

To reset a password:

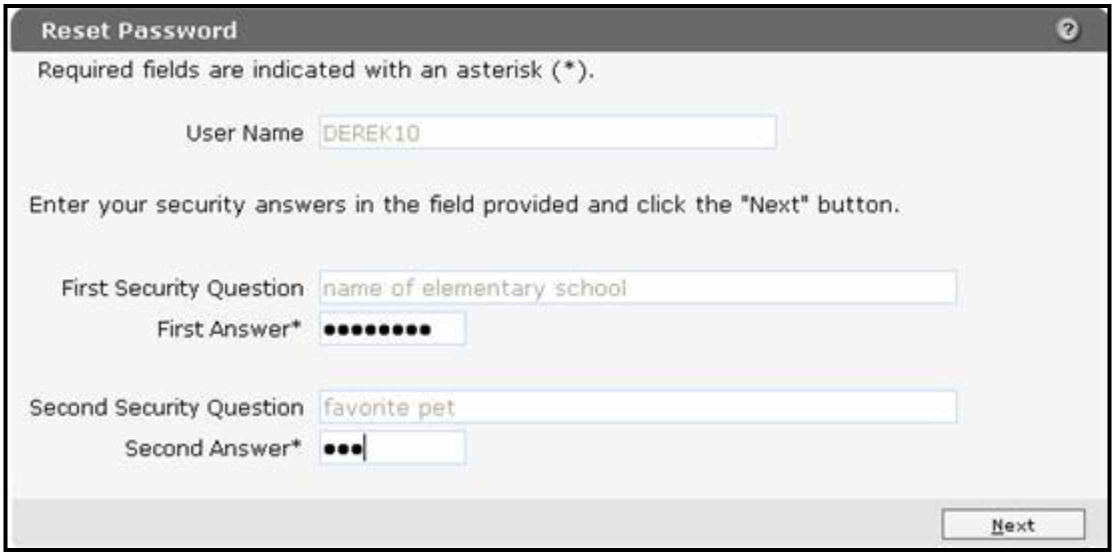
1. In the login panel, click **Forgot your password?**

   The **Reset Password** panel will be displayed.

Reset Password Panel

2. Enter the user name for the account.
3. Click **Next.**

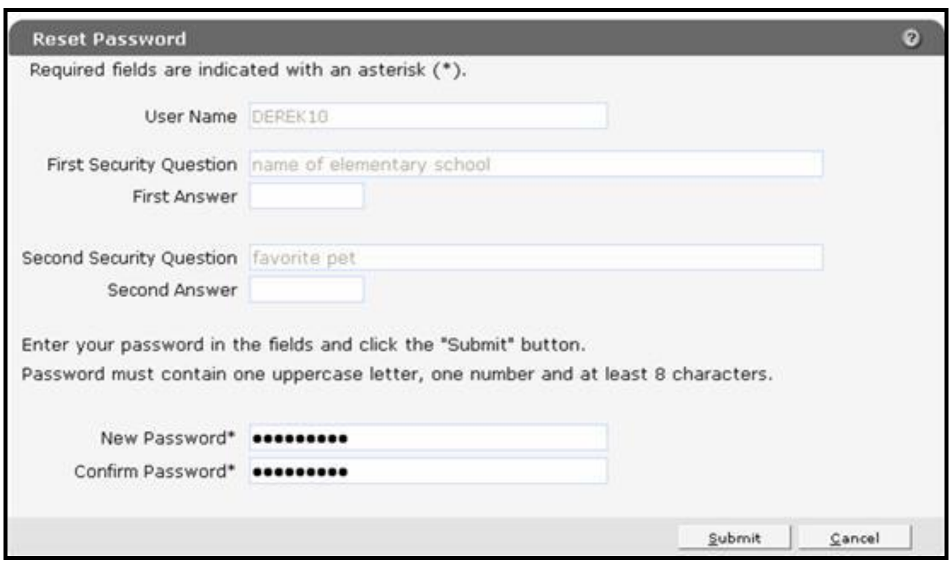
   The security questions panel will be displayed with the questions you were asked to create when the account was setup.



Security Questions

4. Enter your answers to both security questions in the spaces provided.
5. Click **Next**.

   The Reset Password Panel will expand to enable you to create a new password.



6. Enter your **new password** (Twice for confirmation) in the spaces provided.
7. Click **Submit.**

   You will be returned to the login page to log in with your new password.

4 Clerk Maintenance

Once your account is set up, you may access the secure area of the Portal where you can perform various functions that allow you to manage your account.

4.1 Log in to the Secure Site

1. Access the ForwardHealth Portal at *www.forwardhealth.wi.gov/.*

   The ForwardHealth Portal home page will be displayed.

2. You can log in from the Portal home page or click the button for your organization type (Providers, Managed Care Organization, Partners, Trading Partners) to access the login page.

Note: Depending on your Organization Type, your login page may appear slightly different from what is displayed here. For the purposes of this user guide, only the Provider site will be displayed.

Login Page

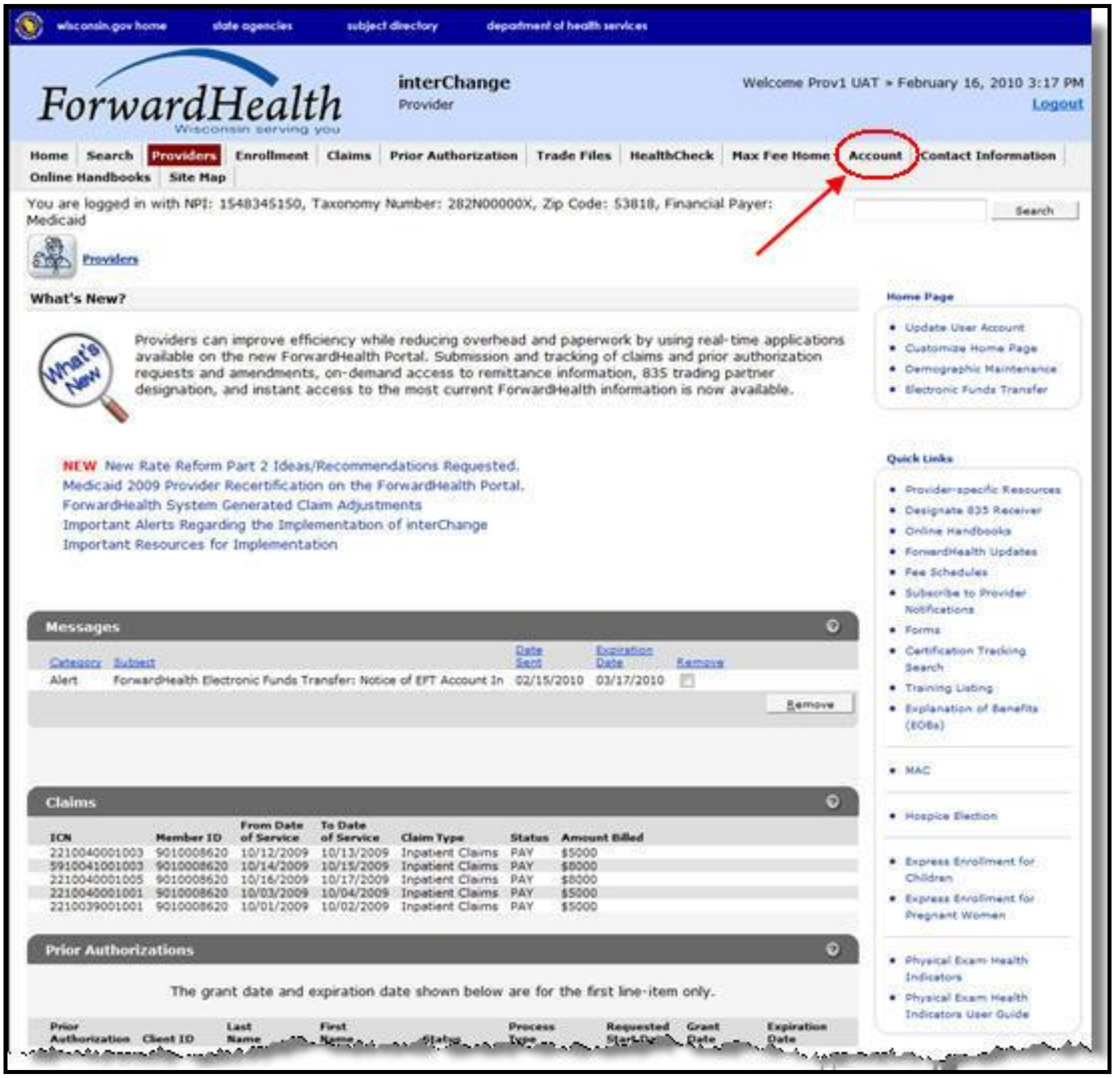
3. In the **Login to Secure Site** section of the webpage, enter the requested information:

   - **Username:** Enter your username.
   - **Password:** Enter your password.

   Your password is case sensitive. Make certain to enter it exactly.

4. Click **Go**.

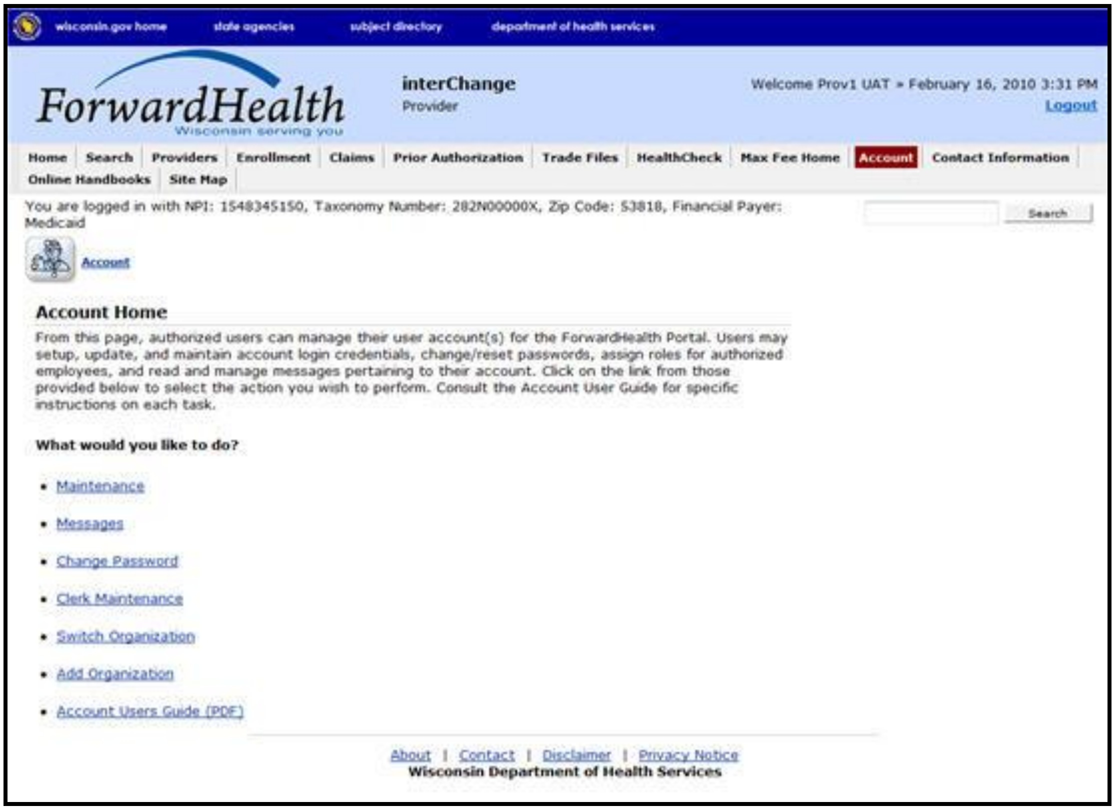
   Your secure home page will be displayed.



Provider's Secure Home Page

5. Click the **Account** icon, located in the main menu at the top of the page.

   The Account Home page will be displayed.



Account Home Page

There are various account management functions that can be performed using the links on the Account home page. This section of the user guide covers how to setup and manage clerk accounts and assign roles to the clerks. The other functions that can be accessed from the Account page can be found later in the Account Management section of this document.

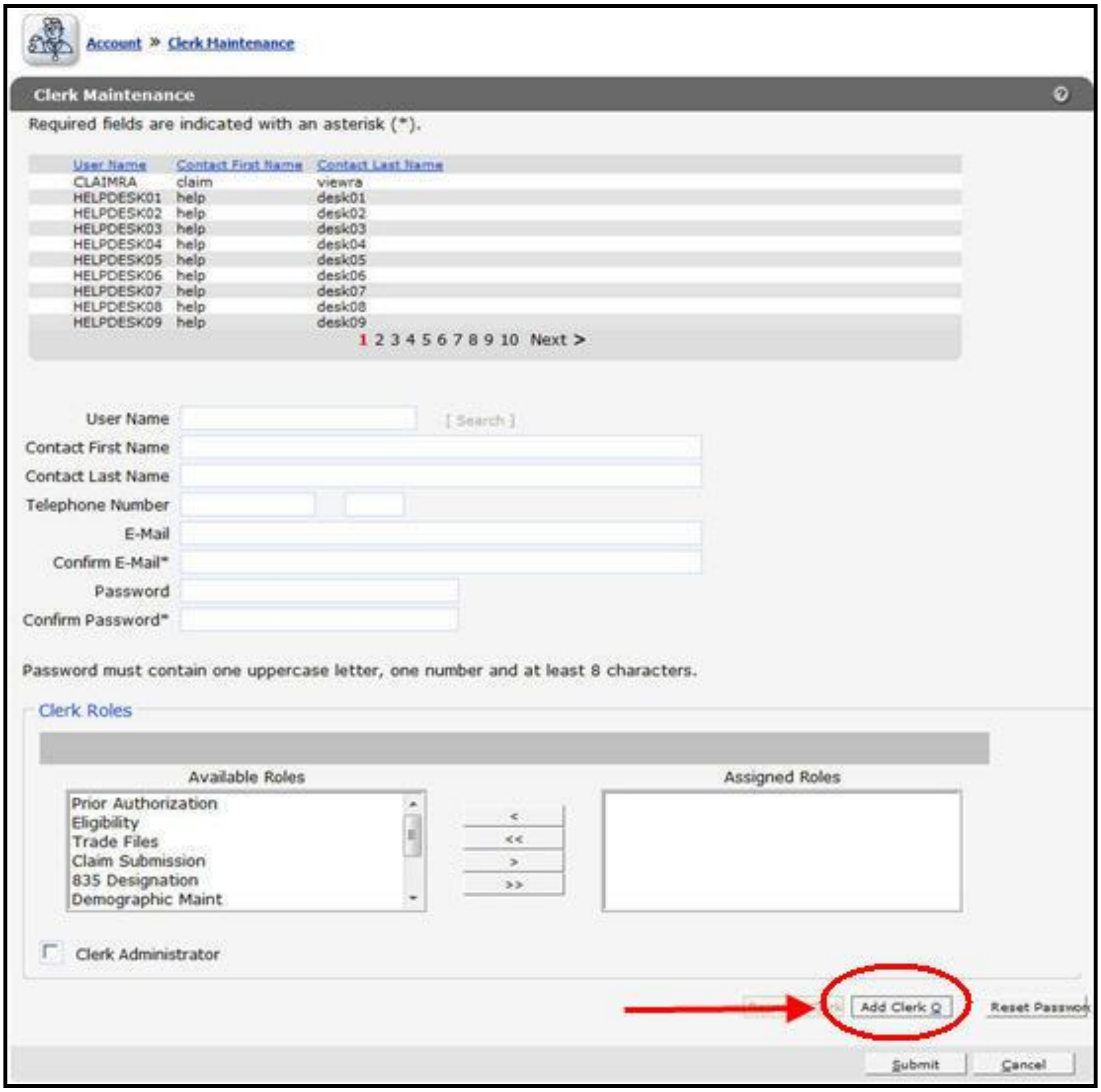
If more than one person will be working on the account, you must setup clerk accounts and assign the clerks roles for the various functions the clerks will be performing.

The Clerk Maintenance page enables account administrators and clerk administrators to add or remove clerks, change clerk profiles to assign roles and privileges, and reset a clerk's password.

Note: Clerk Administrators may not administer their own accounts or those of Account Administrators above them.

1. In the Account Home page options, click **Clerk Maintenance**.

   The Clerk Maintenance Panel will be displayed.



Clerk Maintenance Page

From the Clerk Maintenance Panel, you have the option of performing four functions.

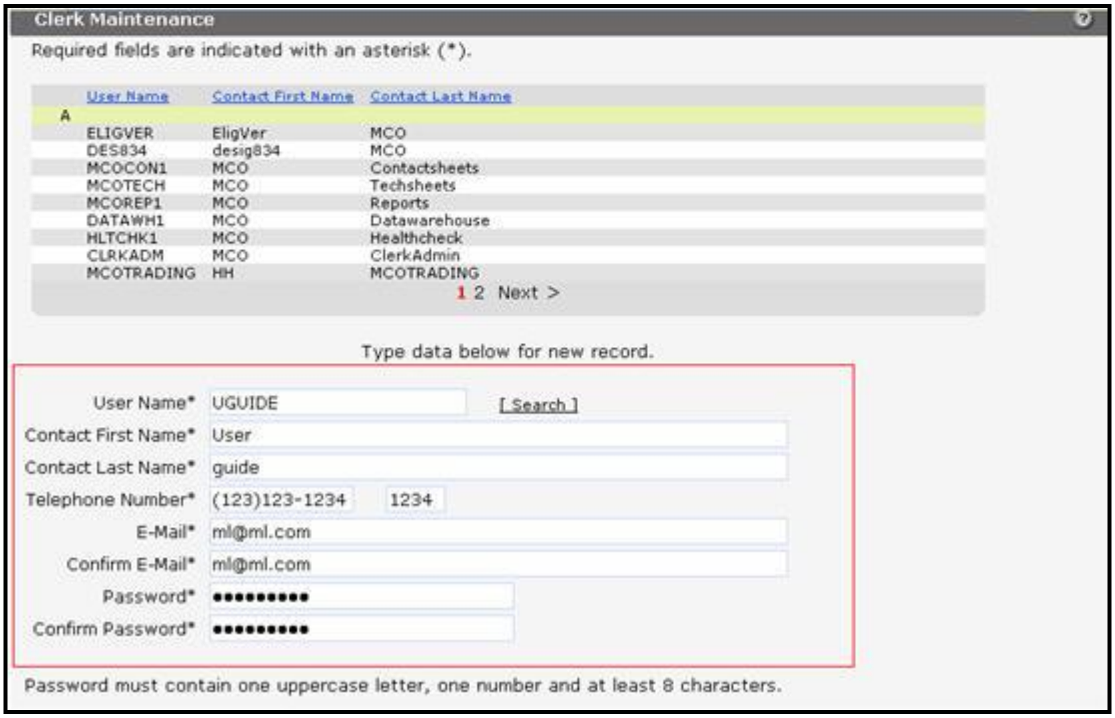
- Add a Clerk
- Remove a Clerk
- Change Clerk Profiles & Roles
- Reset a Clerk's Password

4.2 Add a Clerk

Note: Only Account Administrators or existing Clerk Administrators may perform this function.

1. On the Clerk Maintenance Panel, click the **Add Clerk** button, located near the bottom right corner of the panel.

The panel refreshes, displaying a new yellow row marked with an **A** as shown below. This row serves as a placeholder for the new entry.



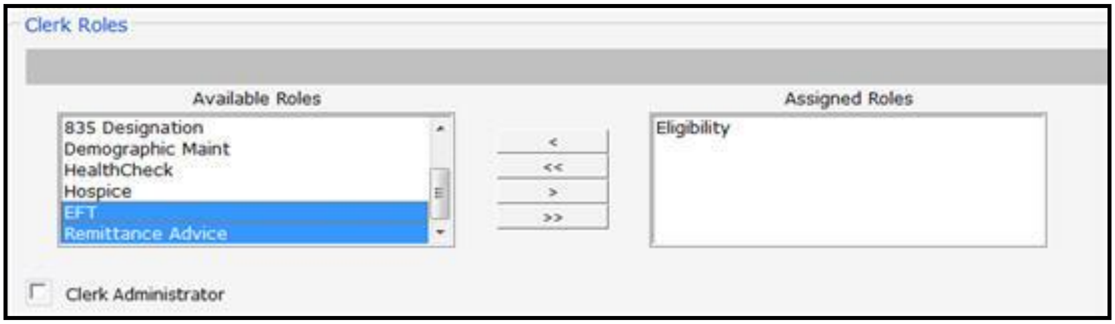
2. Choose a **User Name** and enter it in the space provided.
3. Enter the new clerk's **First Name** and **Last Name** in the spaces provided.
4. Enter the new clerk's **Telephone Number** and extension (if applicable) in the spaces provided.
5. Enter the new clerk's **E-Mail address** (twice for confirmation) in the spaces provided. Select an initial **Password** for the new clerk and enter it twice for confirmation in the spaces provided. (The password may be changed later by the individual.)

Note: The Password MUST contain at least one uppercase letter and one number.

4.3 Add a Role to a Clerk

To add a role to a new or existing clerk:

1. Scroll down to the **Clerk Roles** section of the Clerk Maintenance panel and select from the available roles. To select more than one row, hold down the **Shift** key and click all the roles you want to select.



Clerk Roles Section

2. Click the **>** arrow. (If you wish to add all clerk roles to the clerk, click the **>>** arrow.)

   The selected role will be added to the clerk's assigned roles.

3. Click **Submit** at the bottom of the panel.

   If the save was successful, a confirmation message will be displayed at the top of the panel.

   If there are any problems with the save, an error message will display here instead.

4.4 Assign a Clerk Administrator

The Clerk Administrator role enables a clerk to create and manage clerks assigned to them.

To assign the Clerk Administrator role:

1. Add the roles you want the clerk administrator to manage to a new or existing clerk by highlighting the roles in the **Available Roles** field as shown above.

2. Click the **Clerk Administrator** selection box in the bottom left corner of the panel.

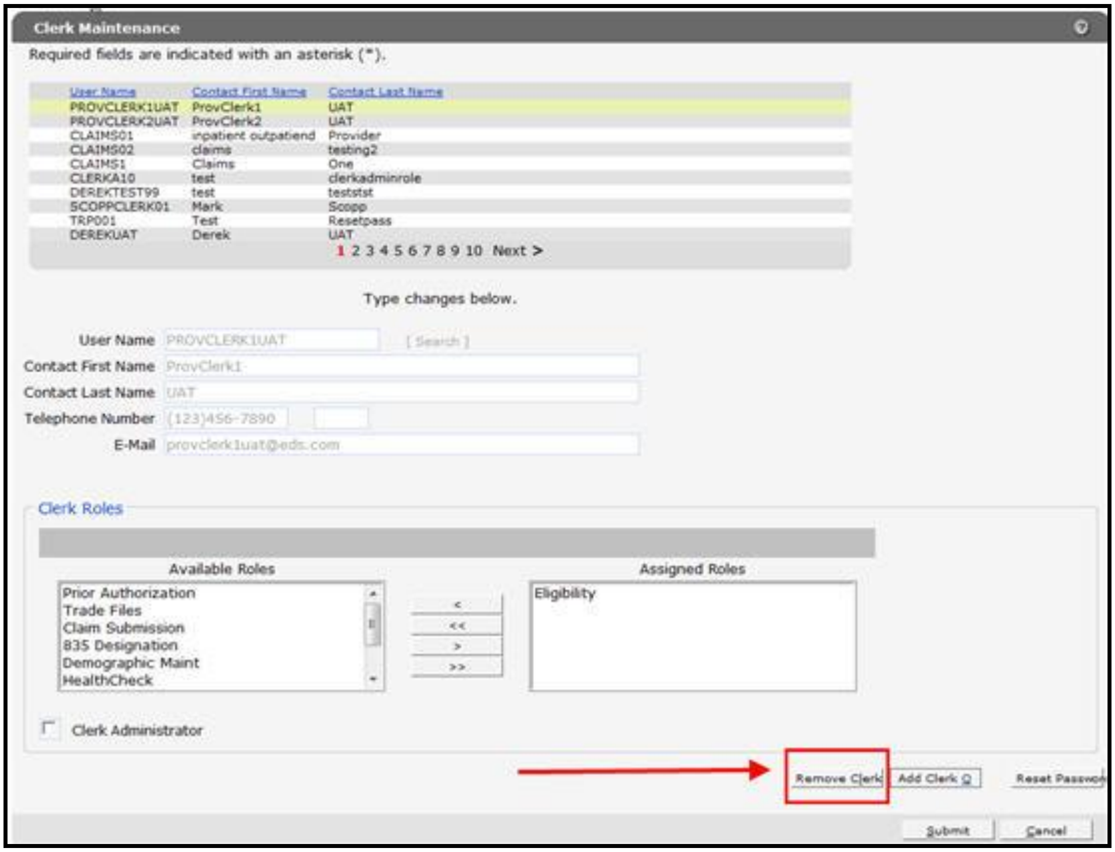
3. Click the Right Arrow (**>**). (If you wish to assign management of all clerk roles to the clerk, click the **>>** arrow.)

4. The selected roles will be added to the clerk administrator's assigned roles.

4.5 Remove a Clerk

Note: Only Account Administrators or existing Clerk Administrators may perform this function.

1. On the upper portion of the Clerk Maintenance Panel, click the row containing the name.



Note that the clerk's information appears in the fields in the center of the panel.

2. Click **Remove Clerk** to initiate the record deletion.

A dialog box appears and asks if you are sure this is the row to mark for deletion:

3. Click **OK** to mark the row for deletion.

   A letter "D" appears at the beginning of the row marked for deletion.


Clerk Maintenance

Required fields are indicated with an asterisk (*).

	User Name	Contact First Name	Contact Last Name
D	PROVCLERK1UAT	ProvClerk1	UAT
	PROVCLERK2UAT	ProvClerk2	UAT
	CLAIMS01	inpatient outpatiend	Provider
	CLAIMS02	claims	testing2
	CLAIMS1	Claims	One
	CLERKA10	test	clerkadminrole
	DEREKTEST99	test	teststst
	SCOPPCLERK01	Mark	Scopp
	TRP001	Test	Resetpass
	DEREKUAT	Derek	UAT

1 2 Next >

4. Click the **Submit** button at the bottom of the panel to complete the clerk removal action. (The record is not deleted until this is performed.

   A confirmation message is displayed at the top of the panel indicating the save was successful and the record will no longer appear in the list of User Names at the top of the panel.

   If there is a problem with the save, an error message will display instead indicating the source of the problem.

4.6 Change Clerk Profiles & Roles

Note: Only Account Administrators or existing Clerk Administrators may perform this function.

To change a clerk's profile or role:

1. On the upper portion of the Clerk Maintenance Panel, locate the User Name of the clerk you want to remove.


Clerk Maintenance

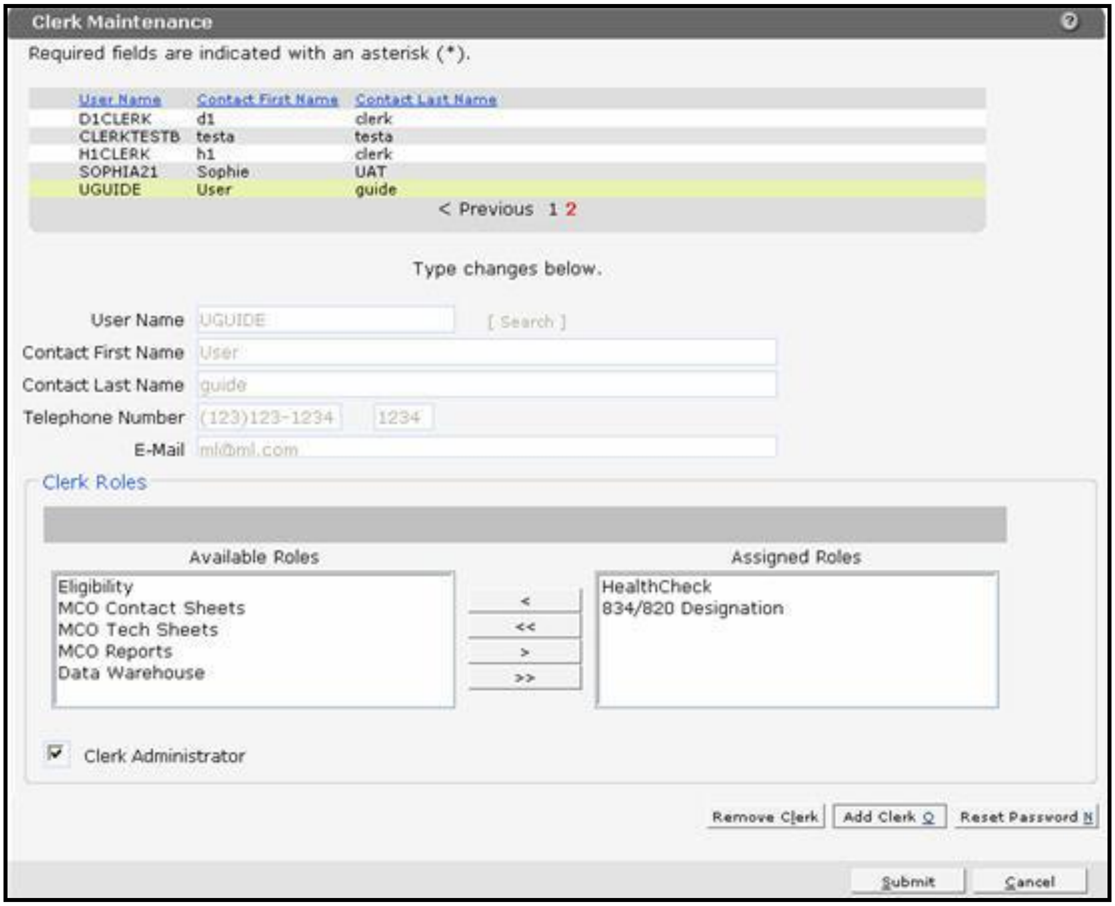
Required fields are indicated with an asterisk (*).

User Name	Contact First Name	Contact Last Name
D1CLERK	d1	clerk
CLERKTESTB	testa	testa
H1CLERK	h1	clerk
SOPHIA21	Sophie	UAT
UGUIDE	User	guide

< Previous 1 2

2. Click on the row containing the name.

The panel refreshes and displays the clerk's information.



3. Clerk information may be edited by simply highlighting the correct field and changing the text within.
4. Roles may be added or removed by using the buttons in the Clerk Roles section of the panel.
   - To remove a role or roles, click the role(s) in the **Assigned Roles** section and use the following buttons:

     < = Remove Selected Item(s)

     << = Remove All Items
   - To add a role or roles, click the role(s) in the **Available Roles** section and use the following buttons:

     > = Add Selected Item(s)

     >> = Add All Items

5. Click **Submit**.

   A confirmation message is displayed at the top of the panel indicating the save was successful and the record will no longer appear in the list of User Names at the top of the panel.

   If there is a problem with the save, an error message will display instead indicating the source of the problem.

4.7 Reset a Clerk's Password

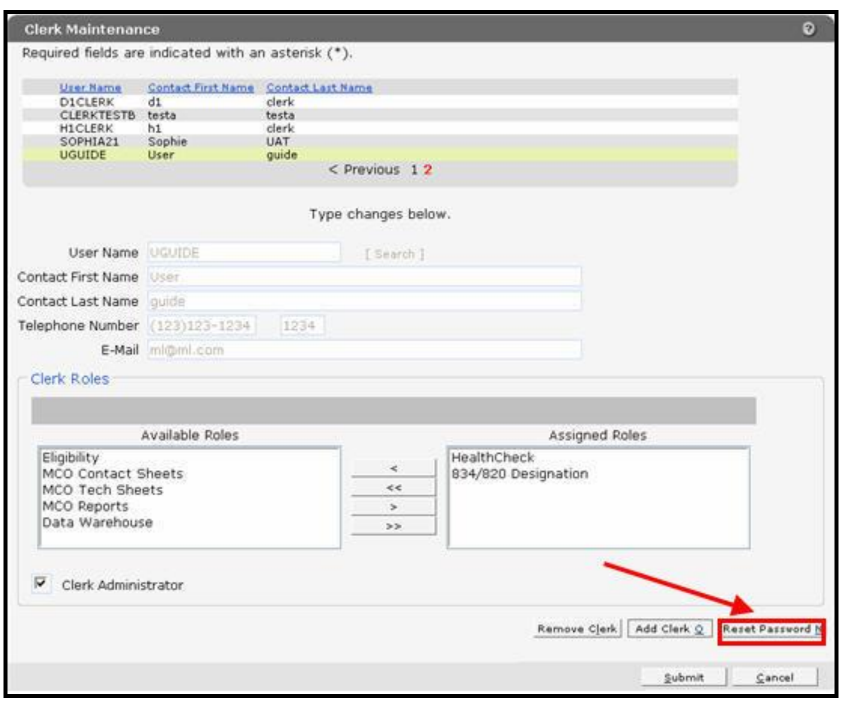
Note: Only Account Administrators or existing Clerk Administrators may perform this function.

To reset a clerk's password:

1. On the upper portion of the Clerk Maintenance Panel, locate the User Name of the clerk you want to reset.

2. Click on the row containing the name.

   The panel refreshes and displays the clerk's information.



3. Click **Reset Password.**

The Reset Password Panel appears.

Reset Password Panel

Important: The New Password you create MUST have at least one uppercase letter and one number or you will be asked to re-enter a password.

4. Enter the **New Password** for the clerk (Twice for confirmation) in the spaces provided.
5. Click **Reset Password**.

   A confirmation message will be displayed indicating that the new password has been accepted.

Note: The password change is immediate. The clerk can begin using the new password right away.

If there is a problem with the password change, an error message will display instead indicating the source of the problem.

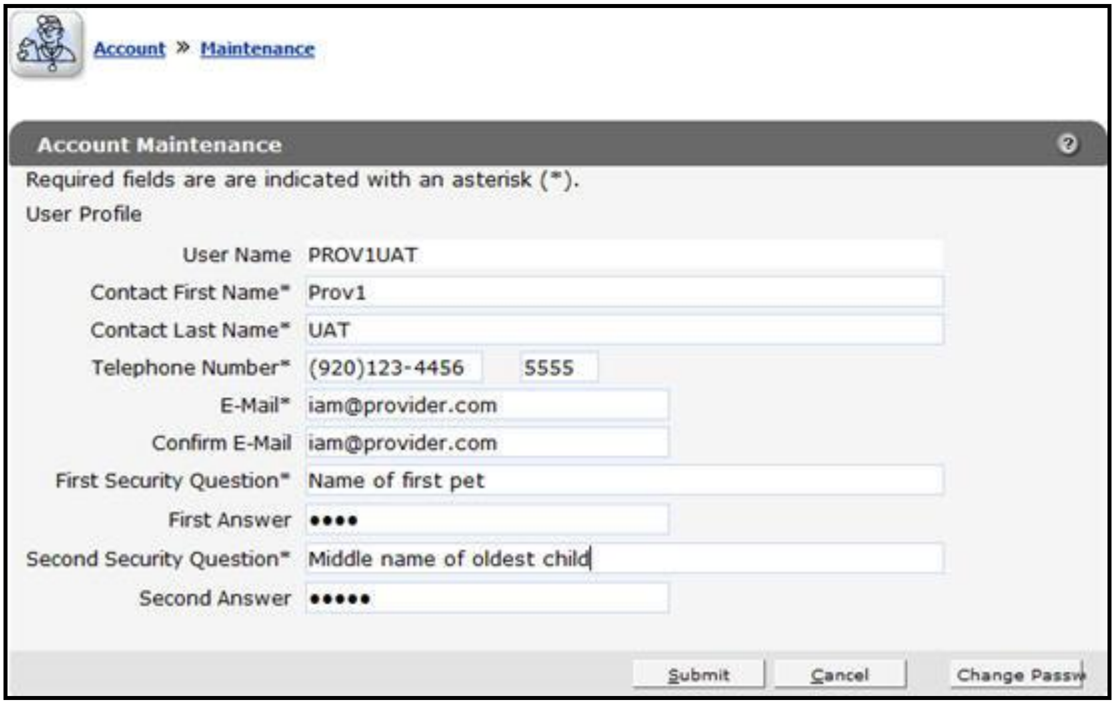
5 Account Management

5.1 Account Maintenance

Users may access the Account Maintenance page to change account information. Contact names, phone numbers, and e-mail addresses may all be updated through these panels. Additionally, users may change their password with this process.

1. On the Account home page, click **Maintenance**.

   The Account Maintenance will be displayed.



Account Maintenance Page

Important: If not already created, you will need to create two security questions and corresponding answers prior to submitting your changes. Security questions cannot contain characters other than A-Z, a-z, or 0-9

In the event you forget or lose your password, this information will be used to validate your identity and allow you to reset your password. Be sure to create questions which you will readily know the answer to but which are not common knowledge about you.

2. Enter at least the required information if you are setting up a new account. You can also use this panel to update account information.
3. Click **Submit**.

   If the request is successful, the following message will display at the top of the page:

If there are any problems, an error message will display here instead explaining what needs to be corrected.

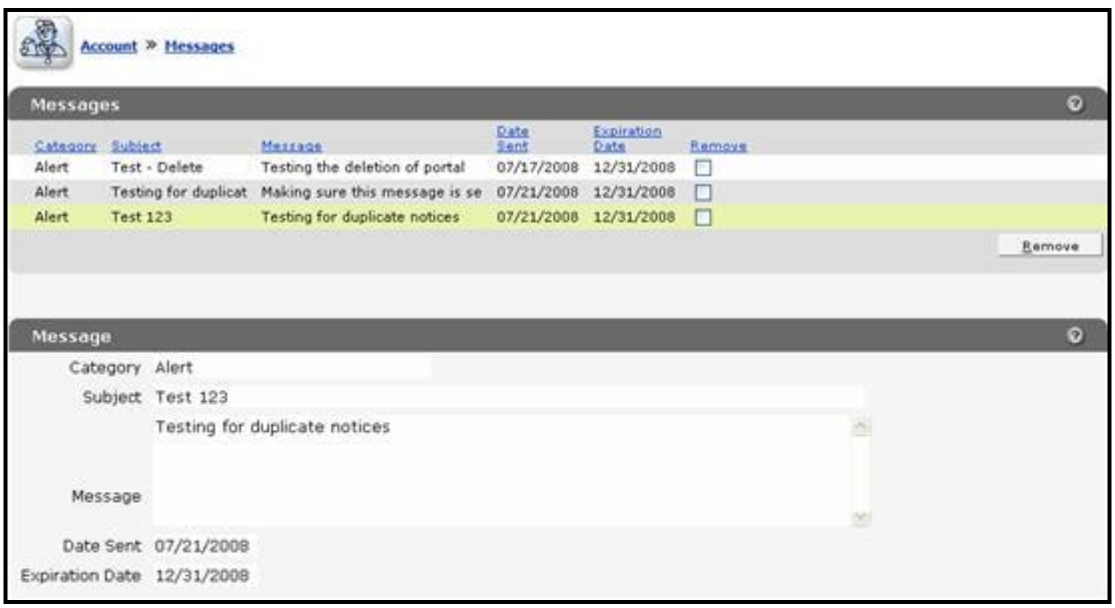
5.2 Messages

The **Messages** link on the Account page allows you to view and manage all your messages. Your most recent messages are displayed on your secure home page. This page functions as a mailbox that displays all active account messages such as alerts or notifications for your portal user account.

The messages are sent to your account by a portal administrator and are available for a designated period from the date send to the expiration date. A message is only removed from the Messages page on its expiration date or if it is manually removed by the user. The expiration date is set by the portal administrator.

1. On the Account Home Page Options, click **Messages.**

   The Messages page will be displayed.



Messages

2. Click a message in the upper section of the window to select it.

   The message will be displayed in the lower section of the window.

   Messages can be removed by clicking the **Remove** box next to the message and then clicking the **Remove** button.

5.3 Change Password

This function allows all portal users to change their password at any time. Portal account passwords also expire every 60 days and users are prompted to change them on this basis.

Note: The Change Password button on this panel serves the same purpose as the Change Password link on the account home page.

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1. On the Account page, click **Change Password**.

   The Change Password Panel will be displayed.

Change Password Panel

Note that your User Name appears in the top field on the panel. To change your password:

1. Enter your **Current Password** in the space provided.
2. Enter your **New Password** (Twice for confirmation) in the spaces provided.

Important: The New Password you create MUST have at least one uppercase letter and one number or you will be asked to re-enter a password.

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3. Click **Submit**.

   If the request is successful, the following message will display at the top of the page:

If there are any problems, an error message will display here instead explaining what needs to be corrected.

5.4 Switch Organization

This function allows Provider and Managed Care portal users to switch to a different organization under the same account without having to log out and login again. It also allows users to change the default login provider.

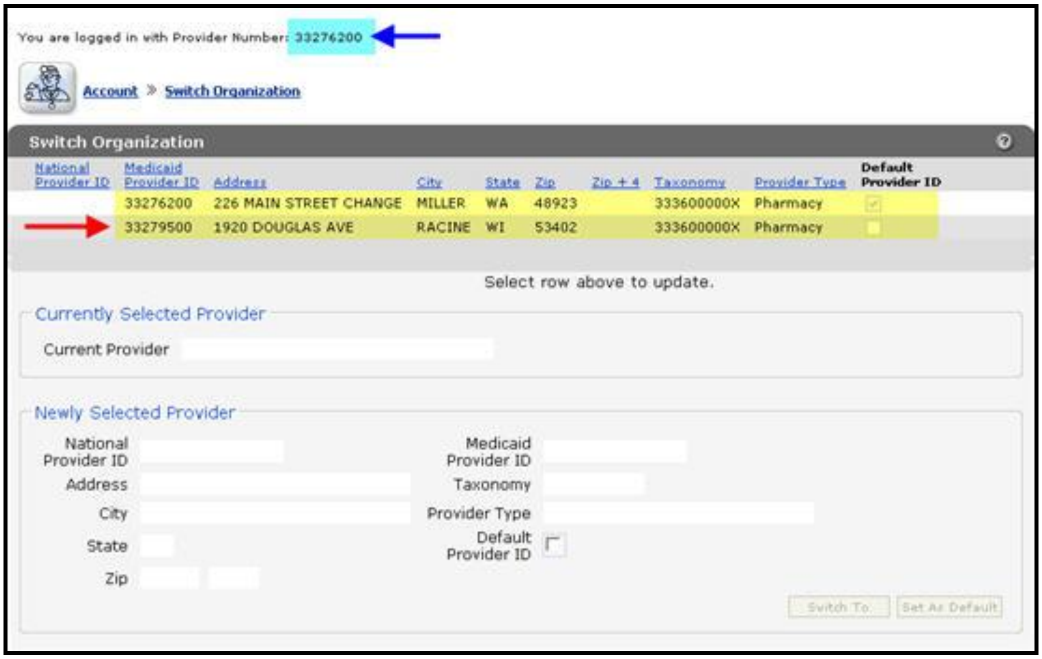
This flexible task offers three kinds of convenience to users when acting on behalf of multiple organizations:

- Administrators and clerk administrators may assign role(s) to a clerk for a different organization within the same account without logging off.
- Clerk administrators and clerks may perform tasks on behalf of multiple organizations within the same account without logging off.
- All Provider and Managed Care users may change the default login organization.

To switch organizations:

1. On the Account Home Page Options, click **Switch Organization.**

   The Switch Organization Panel will be displayed.

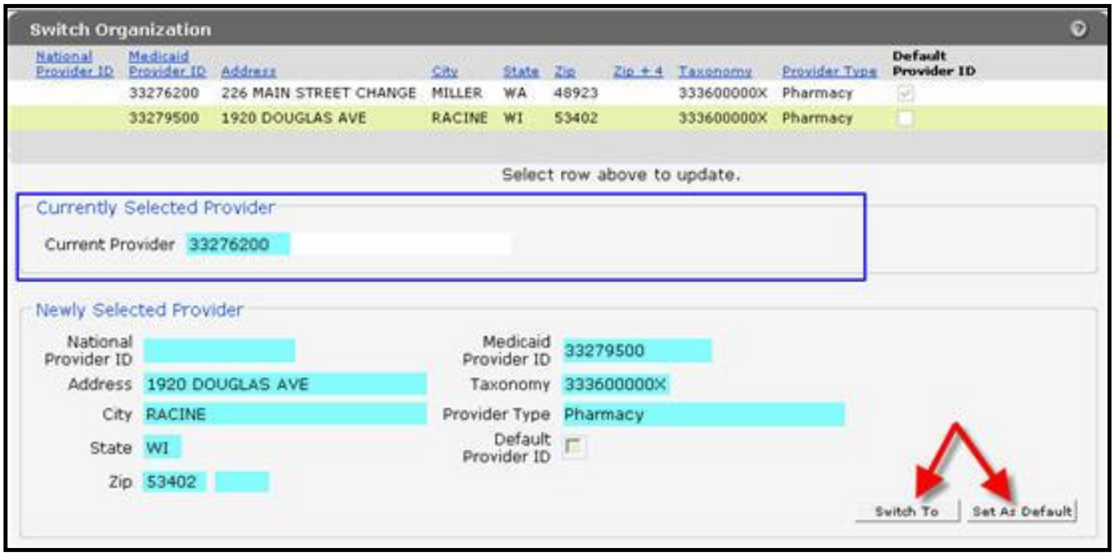


   Switch Organization Panel

   The Provider Number that you are currently logged in with appears to the upper left of the Switch Organization Panel and a list of available organizations appears at the top of the panel.

2. To switch organizations, click on the row corresponding to the new organization.

   The row containing the new organization's name is highlighted in yellow.



The current provider number appears in the **Currently Selected Provider** section of the panel and the provider's information you are attempting to switch to appears in the **Newly Selected Provider** section.

3. Click the **Switch To** button if you wish to switch to the new provider. (If you wish to switch to this provider AND make this your default, click the **Set As Default** button.)

   A dialog box appears and asks if you are sure you would like to switch.

4. Click **OK** to confirm the organization switch.

   You will be returned to the organization home page and your new Provider Number will appear in the upper left corner.

5.5 Add Organization

This functionality allows provider and managed care administrators to add multiple organizations to an existing portal account. It offers the convenience of managing multiple organizations within one account as an alternative to creating a separate account for each organization.

After adding an organization/location to an account, administrators are authorized to perform all tasks, as defined by the roles available for that organization. In addition, all account users, that is, administrators, clerk administrators, or clerks, may move from one organization to the next through the Switch Organization function without having to log out of the account.

To add an organization to an account:

1. On the Account home page, click **Add Organization**.

   The Add Organization panel will be displayed.

   Add Organization Panel

   Note the information regarding authority to administer the new organization's account at the top of the panel.

2. Enter the **Personal Identification Number (PIN)** sent to the organization in the space provided.
3. Enter the **Provider ID** in the space provided.
4. Click **Submit**.